



Primary Records – not under disposal suspension

- We do not have any

Primary Records – under disposal suspension

- Paper records—file in local storage location (see Rec Coord for location) or if you want to keep at your desk because you are currently using it—you must put an out card in the local records storage location or make a transient copy for your use and file the original in the local records storage location.
- Electronic records—move those created in desktop software to ERMS

Transient Records – not under disposal suspension

- Paper Records: You can keep these records at your desk until no longer needed and then dispose of properly.
- Electronic Records: You can keep these records until no longer needed and then dispose of properly.

Transient Records – under disposal suspension

- Paper Records: You should keep these records in your “disposal suspension box” at your desk until the box is full. Contact your records coordinator to transfer to Records Management
- Electronic Records: You should print these records and then retain them in your “disposal suspension box” at your desk until your Records Coordinator schedules their transfer to Records Management.

Idea to start with for paper files:

1. Make two piles (use cheat sheet as guide)
 Transient
 Primary
2. Go through transient records using cheat sheet
 Not suspended – dispose when you no longer need it
 Suspended – either keep in your working files or put in transient suspended box if you no longer need it.
3. Go through primary pile
 Confidential or no classification:
 If you no longer need it – box it up for transfer to primary records storage (index it)
 If it is still being used it should be filed in local records storage. A transient copy may be kept at our desk or you may put an out card in the local records storage location and keep the original

 Restricted items:
 If you no longer need it, it can be boxed and sent to restricted central files- (For PI--unless it is associated with a MEVAL request (disclosures)-- they will remain in our local file storage.)
 If it is still being used it should be filed in local records storage. If it can be copied a transient copy can be kept at your desk or an out card can be put in the local storage location.

Notes:

- (For PI only -- When filing be sure to use the appropriate folder colors per cheat sheet)
- If you get to stuff and there is no place to file (i.e., the local records storage location appears not to have been designated yet) or you are unsure of what to do ask your records coordinator for help.

Ideas to start with for electronic stuff:

Transient not suspended -- delete

Transient suspended -- print and put in transient suspended box

Primary -- if created in desktop software -- move it into ERMS (per PRL filing Topics)

If not created in desktop software -- print and file as described in number 3 above.